San Luis Obispo County HMIS System

User Manual
For
Collaborating Agencies

Contents

Setting up Your Computer and Work Station

Security and Confidentiality

The first layer of security, and the one you have the most control over, is positioning your computer screen and making sure that no one, not even another HMIS user, can see your screen.

If you are entering the data while enterviewing the client you may allow the client to see only the screens that apply to that client. They may not under any circumstances view the client search screen or another clients information.

It is best to set up the computer in an unpopulated area with your back to a solid wall. You may not access the HMIS system where a person could look through a window and view the screen. Violation of these Federal rules could terminate your rights to access the system, result in civil litigation, or criminal charges.

Throughout this intruction manual you will find more security and or confidentiality rules boxed in pink. You will be expected to follow these rules of which may have the same consequences as above.

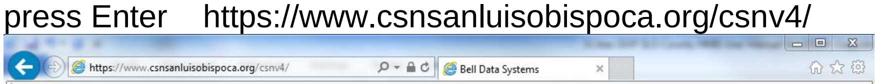
-Confidentiality-
Know and follow the rules

Browser

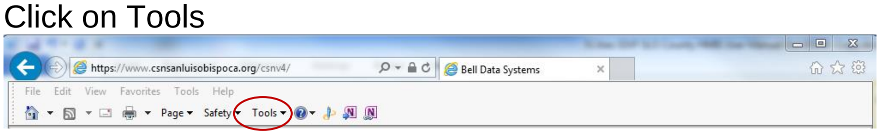
The only browser that works with the HMIS system is Internet Explorer. You will need to make some changes in the Internet Options in order for the browser to operate correctly.

How to set up your browser

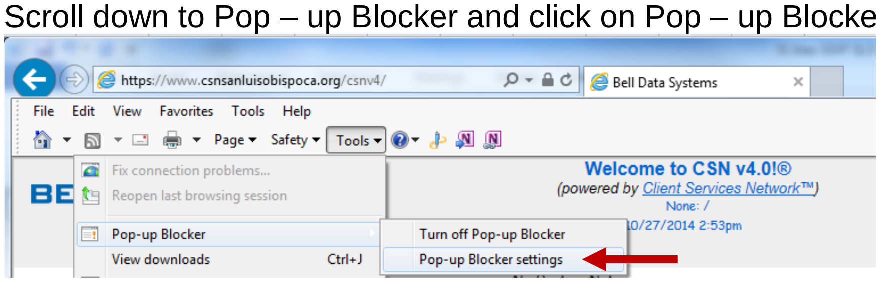
- Open Internet Explorer and enter the following address into the Address Bar and press Enter https://www.csnsanluisobispoca.org/csnv4/



- Click on Tools

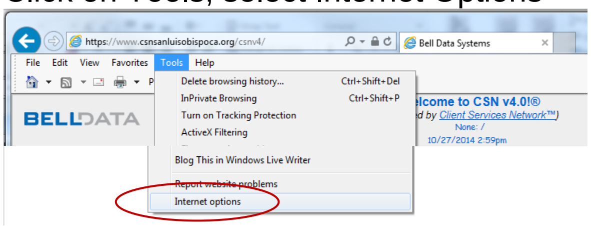


- Scroll down to Pop – up Blocker and click on Pop – up Blocker settings

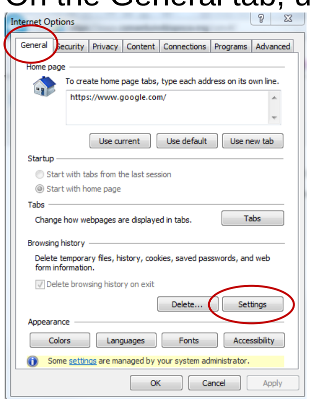


- If the CSN address you are at shows in the window click ADD, if not enter the following and Add it to the list below

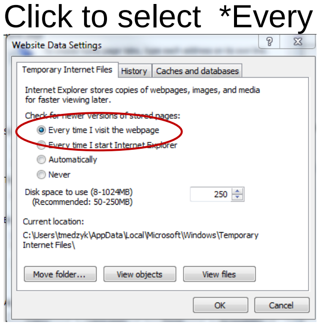
- Click Close
- Click on Tools, select Internet Options



- On the General tab, under Browsing History, click the Settings button

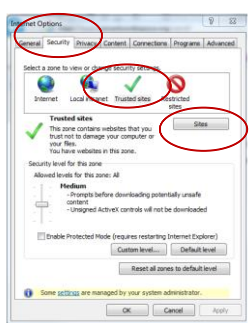


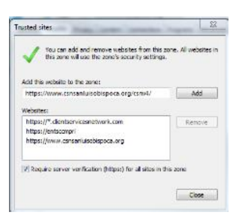
- Click to select *Every time I visit this website, then click OK



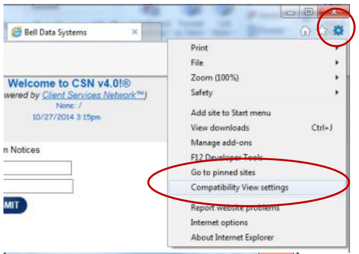
- Click the Security tab
- Click the green Trusted Sites, then Click the Sites button

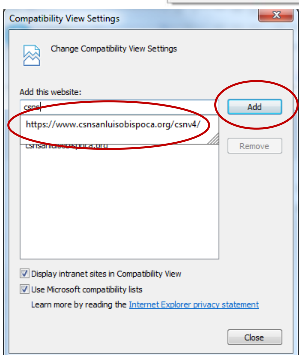
- Add the address to the list, then Click Close





- Set the browser to use compatability mode when at this site



- 

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Accessing HMIS

Using Internet Explorer, type the address of the site you wish to enter.
Training site: https://www.csnsanluisobispoca.org/csnv4train/
Or: https://www.csnsanluisobispoca.org/CSNv4Training/ **(your trainer will tell you which one to use)**
Live site: https://www.csnsanluisobispoca.org/csnv4/

First Time Login Procedures

After accessing the HMIS website, you will see this screen. Click on the User ID box. Type your User ID into the box.

Click on the Password box. Type in the temporary first time password PASSWORD into the Password box. Click on the SUBMIT button.

-Confidentiality-

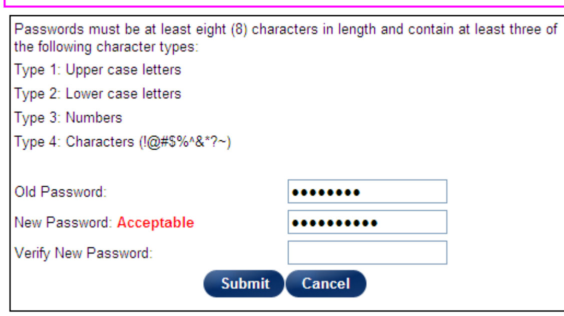
All users must have their own unique user ID. You must never use another user's ID, or allow anyone else to use your User ID.

The next screen you will see asks you to set the password you want to use. You will have to change this password at least every 90 days. You cannot reuse a password. Enter the temporary first time password, PASSWORD, into the Old Password field. If you turned on Caps Lock, turn it off now.

Click on the New Password box. Type in your new password.

-Confidentiality-

User specified passwords should never be shared and should never be communicated in any format.



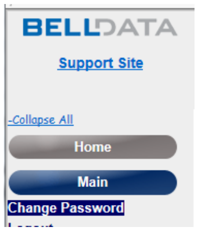
Note: Passwords MUST be at least eight (8) characters in length and must contain at least three (3) of the four (4) character types:
1) Upper case letters
2) Lower case letters
3) Numbers
4) Characters !@#$%^&*?~()

When the minimum requirements are met, the password test notice will change from Unacceptable to Acceptable. If the password uses all four (4) character types, the notice changes to Strong.
Click on the Verify New Password box. Type in the same new password.
Click on the Submit button. If your password is accepted, you will advance to the agency and workgroup selection screen.

I highly recommend you log out at this point and log back in to make sure your log on ID and password are working. You will need to be able to consistently and correctly enter this password every time you log in.

Regular Login Procedures

After you have logged in for the first time and changed your password, the next time you log in you will use the password you set.



If you forget your password contact the HMIS System Administrator who will reset your password to the temporary password, PASSWORD.

If you have reason to believe that someone else has gained access to your password, or you just want to change your password you may change your password by using the Main menu item and selecting Change Password

> -Confidentiality-
> *Do not write down your password and leave it where anyone else can see it. You may not keep it under the keyboard, in your pencil drawer, etc. You may only keep such a document in a locked drawer or cupboard that only you possess a key to.*

If you mistype your password or User ID, you will see the message below. Click on the OK button and try it again. The account is automatically locked out after three (3) unsuccessful attempts.

If you get locked out you must call your Agency HMIS Administrator or the HMIS System Administrator to get your account unlocked.

Things to Remember about Passwords

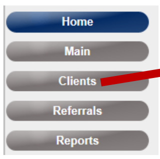
- Your original password is valid for 30 days. You must login within that 30-day period and change it to a new password or it will expire.
- After changing your initial password, your new password will be valid for 90 days.
- The system will automatically direct you to the Change Login Password screen when it is time to change your password.
- Remember, if your password has to be reset your Old Password will be the temporary password, PASSWORD. Remember to turn off your Caps Lock once you have logged in.

Home Page

Menus and Buttons

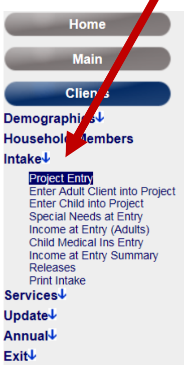
Menu Bar

The menu bar to the left provides access to the application screens. You will only see the menu buttons that your role has permissions to



To expand or collapse a primary menu item, click the button!

Each primary menu displays additional menu items when expanded.



Any menu item with a (down arrow) has additional sub-menu items that are displayed when the item is selected.

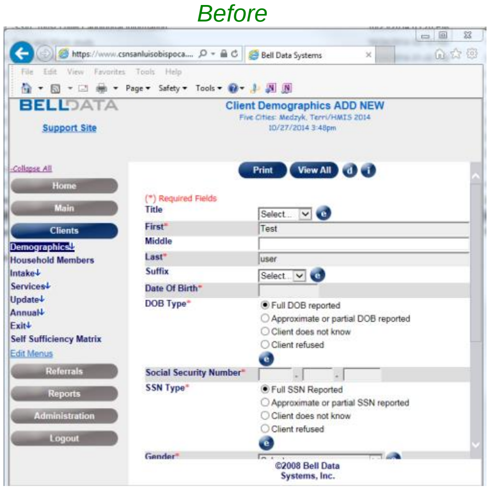
You can move through the screens by clicking the menu

Note: Most Date fields will be asking for the date you collected the information. Reports and reminders will use this date so it is important you get the correct date in these fields. (2014) New data standards dictate that the collection date MUST be the same date as the project entry date for all entry forms, the exit collection date be the same date as the project exit date, same for annual and update forms.

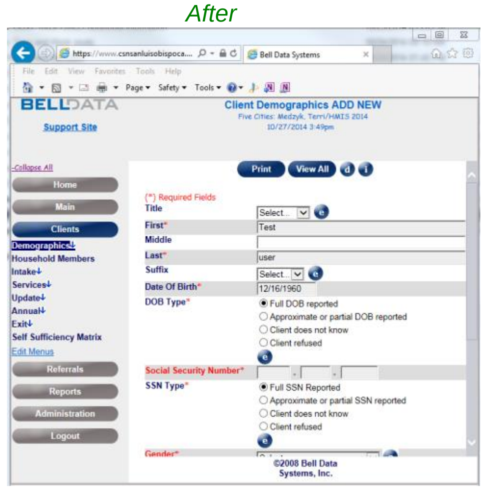
Most date fields will auto fill with the date you enter as the Project Entry date. The date picker will move back a month if you click on Mon (to the left of Mon>) allowing you to back date to the correct date. The system will not allow you to enter a future date.

Any field that has a red asterisk after it must be filled in. You will not be able to continue or save the data until you put a value in these fields. When you click the Save button any required questions that were not filled in will turn red to alert you to fill them out and save.

Before

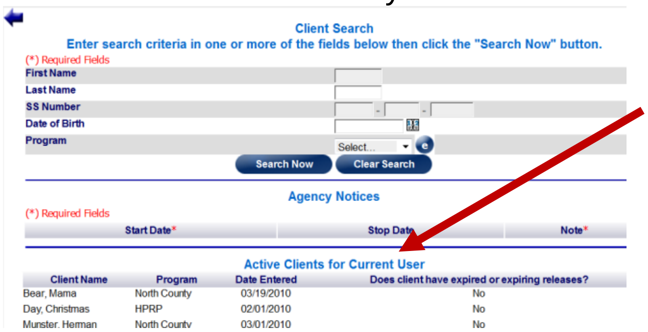


After



Search for a client

This screen is the first one you will see after a valid login.

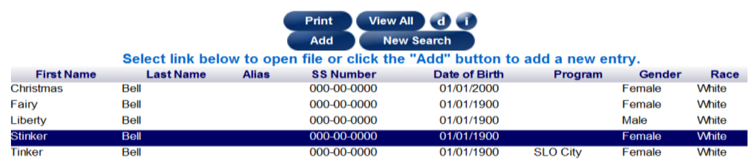


Your Active Client list shows all active clients in this project that have you entered as the Caseworker. You can highlight and click on one to open it directly without having to search. If it doesn't work you need to put your browser into compatibility mode. Even if you are entering a new client you must "search" the database before you can enter the client into the system. It is possible that the client was entered by another agency and it is important to not enter client's demographic data more than once.

To search for a client enter the client information into one or more fields. You can use multiple fields to limit the results to a more specific match or use fewer fields to get a wider result list. You can put up to 5 letters in either or both of the name fields.

When the "Search Now" button is clicked, the Search Results screen below is displayed.

Search Results



When the cursor is moved over a line it is highlighted. Click anywhere on the line to bring up the client's record. If you get no results, or you think you should search a different way you can enter new search criteria by clicking on "New Search".

If your client is not in the database, click on "Add" to add them.

-Confidentiality-

Every time you pull up a client's record it is documented who the client is, the date and time the record was accessed, and who pulled up that client. A client may ask for a report of this documentation concerning his record spanning all projects and agencies. By law, this information is available to the client. If there is ever a breach of confidentiality on a client, this documentation will be investigated. **You may not bring up a client unless you have a legitimate business reason to do so on that specific day at that specific time.**

Please, please, please do everything you can to not create duplicate records. It will adversely affect our reporting to HUD. If you do find that a duplicate exists contact the HMIS System Administrator who can merge the records making the HUD reports more accurate.

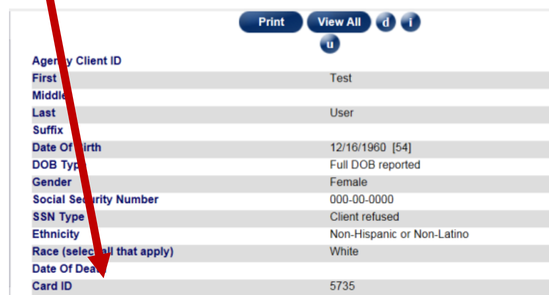
If you make an error in data Entry or if you find there is an error on a previous entry please contact the HMIS Administrator. This is the only area that is shared between agencies so you are not allowed to edit or delete entries that may not be yours. Use the CARD ID found at the bottom of the Demographic page to communicate regarding a client. Never transmit a client's name.

Note:

If the **Date of Birth** is unknown when the record is created, enter "01/01/1900". If all you know is the age you can use the calculator. Just enter the age and click the Approximate or partial value for DOB Type. The calculator will fill in 01/01 and the year.

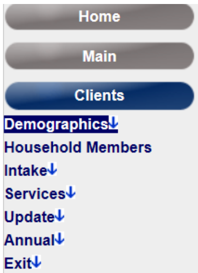
If the **Social Security Number** is unknown when the record is created, enter "000-00-000". If you have a partial number enter zero's for the part that is unknown.

YOU MUST ASK THE CLIENT FOR THEIR SS#. SS#'s are critical to our HUD funding


Print View All

Agency Client ID	
First	Test
Middle	
Last	User
Suffix	
Date Of Birth	12/16/1960 [54]
DOB Type	Full DOB reported
Gender	Female
Social Security Number	000-00-0000
SSN Type	Client refused
Ethnicity	Non-Hispanic or Non-Latino
Race (select all that apply)	White
Date Of Death	
Card ID	5735

Demographics



Once you select the client or finish entering a new client, you will automatically move to the Demographic Menu item.

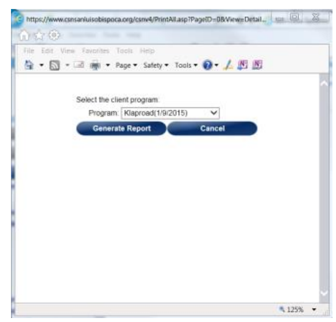
The client demographics record is the primary entry for each client. There is only one entry per client and all other client information is associated (or attached) to this record. If a duplicate record exists for a client, it is because either the name, date of birth, or social security number was different when the record was initially created.

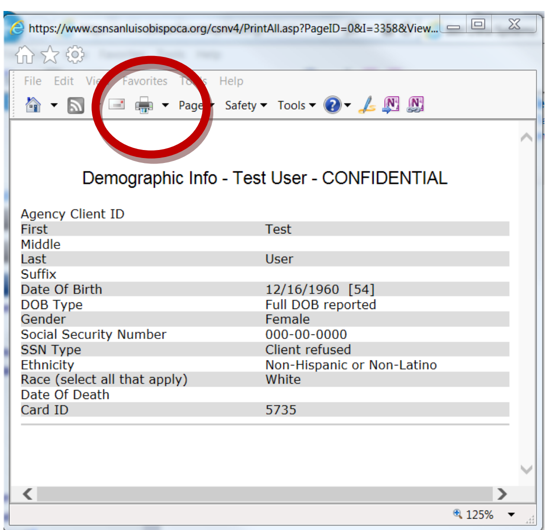
Print Demographic Information

Click the blue down arrow to open the sub menu.

If you are entering live, not from a previously completed paper form, you will print out this section and put the paper copy into the clients chart.

When you click the Print Demographic Info sub menu item a pop up box will open. Click on Generate Report.





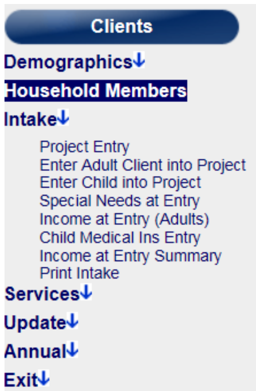
When the report renders Click the printer icon on your browser tool bar to print to your computers default printer. You can use the drop down arrow next to the printer icon to select "print" and then select a printer.

-Confidentiality-

Make sure wherever you print to you can retrieve the print out right away. This is confidential information and must not be seen by anyone else using, or happens to be by, the printer.

You may want to get everything entered and then come back and print each section.

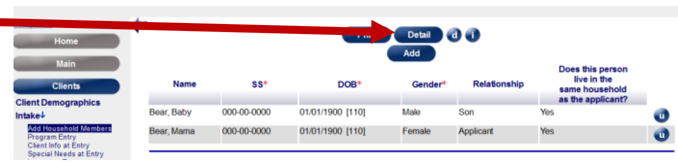
Household Members



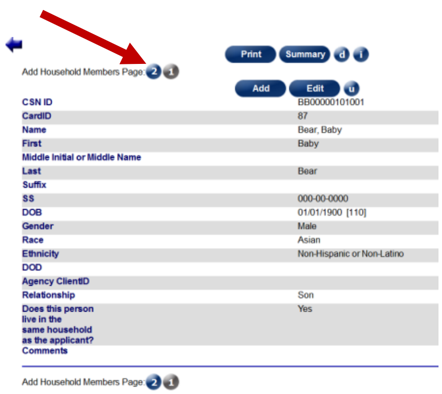
The household member summary page shows a list of individuals who currently live or have lived with the client. These entries represent the client's household.

To view further details for a household member, click on the Detail button.

The system displays the Household Members information in pages.

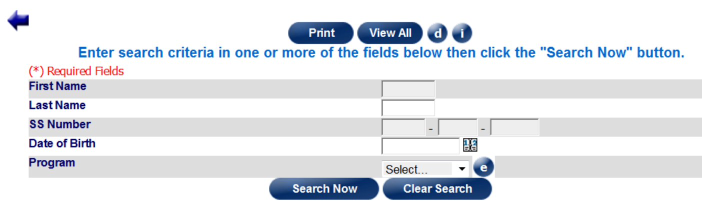


These numbers in bubbles represent pages. Hover the cursor over these numbered bubbles to see what information is on that page.



Click on the numbered bubble to display that page.

If a household member is not listed, or you want to add a household member to the list, click the Add button.

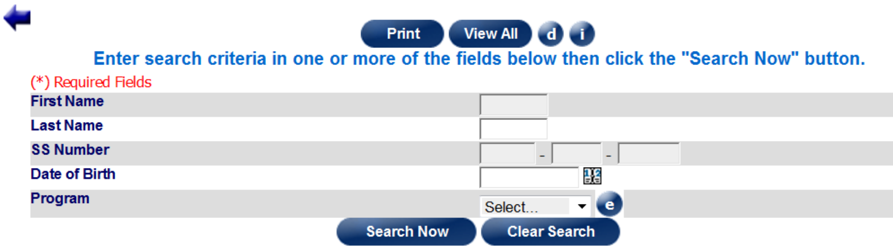


Household member demographics are added the same way as the client demographics and therefore require you to search for the household member. If you find the household member in the search, just click on that person and the project will add that person to the household and return you to the household member search screen. If you do not find the household member in the search then you can add the record. Please follow the same standards to search for a household member as you do a client. Duplicates here are just as bad as a duplicate Head of Household.

Once a client is entered as a household member they will also be available under the regular client Search, but you will need to go into the Head of Household's record to get to the information recorded about the project entry. If you go into the household member's record you will have access to their demographic and household information but not the Project information.

Step by Step Directions: How to Enter a Household Member

1. Click Add

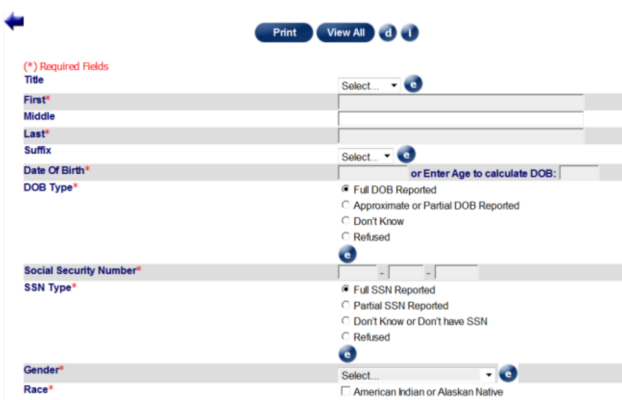


2. Search for the member:

*If the member comes up in the list

1. Click on the name to add the member to the household

2. The project will return you to the Household Member search screen



*If the member does not come up in the list

1. Click the Add button
2. Fill in the fields
3. Click Save (scroll to the bottom of the page)
4. The member's demographic record will show, or click Summary to see each member's data in pages.

To Enter Another Member

If you are at the search screen just repeat the above instructions

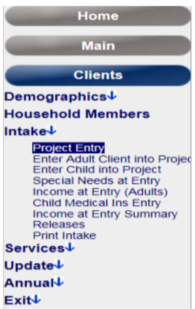
If not, but you do see an Add button, click Add to get to the Search Screen

If you don't see an Add button, click the Summary button, then the Add button to get to the Search Screen

Intake

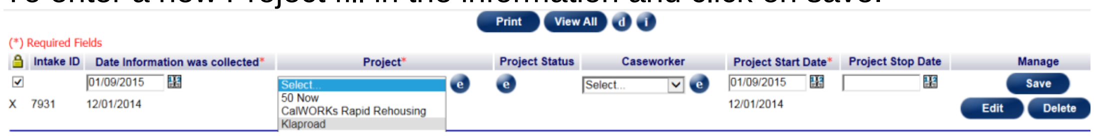
Click on the down arrow beside Intake to open the Intake sub Menu
Project Entry

Project Entry



Click the Project Entry sub menu item
If the client is or has been in one or more projects within your agency, those entries will show in a list.

To enter a new Project fill in the information and click on save.



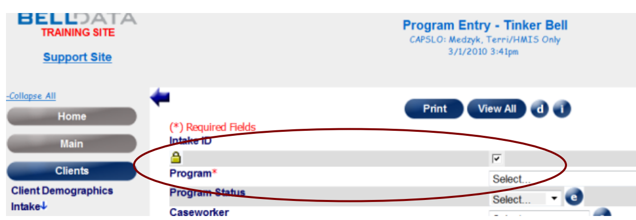
Be very careful to select only your project. The other projects listed belong to other agencies and errors here could be damaging to your and others reporting.

The Project Entry screen begins the process of entering the household into a project (you must still enter the project specific data in the next screens for each member before a case is created).

You may also assign the caseworker here. When a caseworker is selected, the clients will appear on the Home page for that caseworker.

Now the project you just entered the client into will show in the list

-Confidential-
All non-demographic pages have a yellow lock icon on them. Shown here in the "Locked" position by the check mark to the far right, the data from this page is not going to be shared with any other agency.



By clicking the check box, the check mark disappears and the information can be seen by the agencies the user designates at the end of the data entry process.

Step by Step Instructions: How to Enter the Household into a Project

(a single client is also considered a household)

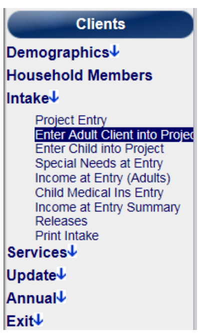
1. Look to see if the client or household was in a previous project.
2. If yes, click Add. If no, go to the next step
3. Fill out the fields
4. Click Save

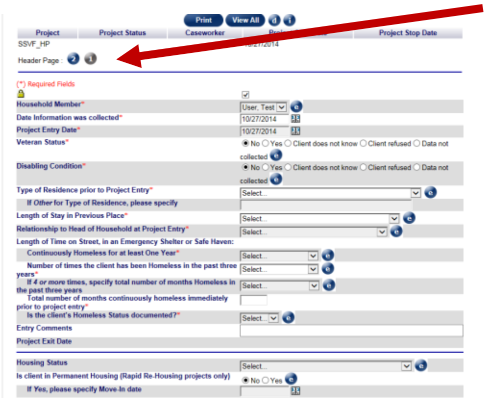
Client Information at Entry

The "Enter Adult Client into project" and the "Enter Child into Project" screens put the individual household/family members into the project.

An entry must be made for each household member participating in the project. Always start with the Head of Household.

If the client is or has been in more than one project you must make sure you have the one you want to work with showing at the top. If it is not, hover over the numbered bubble page number above the blue line to find the right one. Click that bubble page number to display the correct project.





Whatever project is showing will be the one you are entering clients into.

New entry: Once you get the right project at the top you will see the data entry screen. Click Add to enter the Head of Household's information.

Very Important Concept: if you are editing or adding info to a project that is already in the system you will see the project pages bubbles above the blue line. If there are multiple adults, once you have them entered, they will show as bubbles BELOW the blue line. Throughout the system you will notice multiple Projects show in bubbles ABOVE THE BLUE LINE, multiple Household Members show as bubbles BELOW THE BLUE LINE. You can hover over the bubble to see which one it represents and click on a bubble to make it active.

This is the most confusing element in the Bell Data system. It is important that you master this concept. Whatever project is listed above the blue line is the project that the data on this page will be attached to.

You can add the next adult household member by clicking the ADD button and filling the form out again, or you can use Copy.

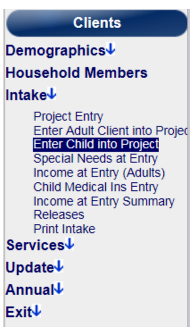
To use Copy: After you enter the information for the Head of Household, and save, click Copy. Change the Household Member field to the adult member you need to enter next, by clicking the drop down arrow and selecting the household member. Change whatever data is different from the member you copied from. Save the record by clicking the Save button at the bottom of the page

Whichever button you use, create a record for every adult member. You can only copy from the Head of Household's record, not from another member's.

You must SAVE each page to create a record for each adult Household Member.

Use the "**Enter Child into Project"** to enter all household members who are under the age of 18 at the time they enter the project. This form is an abbreviated version of the Adult form.

When you have all the household members in and saved, click Special Needs on the menu.



Step by Step Instructions: How to Enter Household Members into the Project:

1. Make sure the project you want to enter the members into is showing at the top
   * If it is not,
     a. hover over the page number bubble above the blue line to find the right project
     b. Click that page number bubble to display the correct project
     c. Whatever project is showing will be the one you are entering clients into.

2. Fill out the data entry screen with the Head of Household's information in the Adult screen. If the Head of Household is under 18 you still enter the Head of household under Adult.

3. Click the Save button

4. If you have more adult household members, decide if you want to Add or Copy
   a. To add an adult household member
      1) Click the Add button
      2) Use the Household Member drop down list to select the next Household member
      3) Fill out the fields with this adult household member's information
      4) Click the Save button
   b. To Copy
      1) Make sure you have the Head of Household's page open by hovering over the page numbers at the bottom of the screen until you find the Head of Household's page and click that page number.
      2) Click the Copy button
      3) Use the Household Member field to select the correct adult member
      4) Change any fields that have different values for this member than the Head of Household's values
      5) Click Save,

NOTE: This is where many go astray. CLICK SAVE for each member before you go to the next member, or you will loose that persons record.

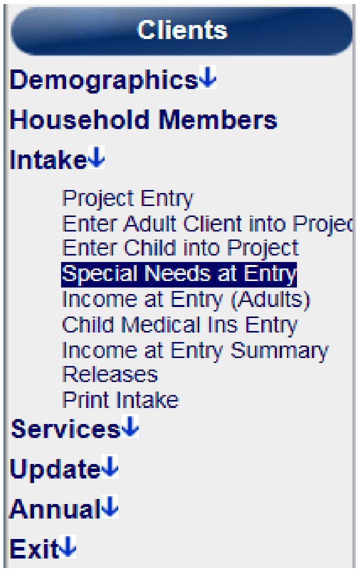
      6) To enter another adult member repeat from To Copy step b 1. You can only copy from the Head of Household's record

5. If you have household members under the age of 18 use the Enter Child into project form and enter each child's information and save each one.

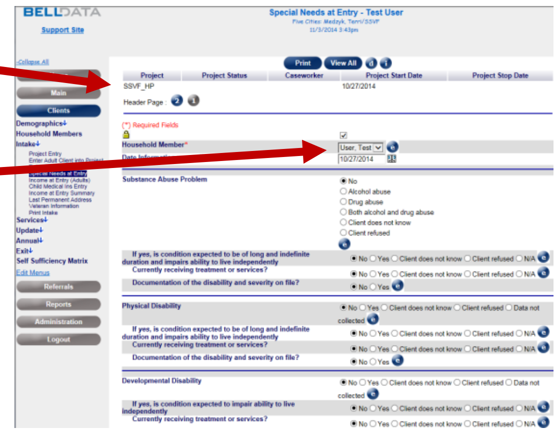
Note: While you are entering household members Do Not Click the Next Button. It will take you out of the Client Project Open screen.

6. Before you move on count the number of bubbles below the blue line in both the adult and child forms and match that count to the number of adults and children in the household, then hover over each page number bubble below the blue line in the Adult and child forms to make sure you account for every member's information.
7. Click the Special Needs menu item to move to the next screen

Special Needs



Special Needs must be entered for each household member participating in the project.



Make sure you have the right project showing, and select the household member using the drop down arrow.

Enter the data for each specific Household Member saving for each member.

SAVE the record by clicking the Save button at the bottom of the page. <u>You must SAVE each page to create a record for each Household Member.</u>

Once you have saved the Head of household's record, that record shows. You can then Add or Copy to put in the next household member. Be careful to change the Household Member and any other differing information. Make sure you get all household members saved.

You can edit and delete records if you need to, but be careful and mindful.

Note: If you click the Next button before you save the **last** member, the project will prompt you to save. If you do not <u>save between Household Members</u> you will lose data.

As you add the Special Needs records for your household members, you will see the page number bubbles under the blue line and at the bottom of the screen. Before you leave this screen count the number of bubbles below the blue line and make sure it matches the number of Household Members. Hover over each number bubble and make sure that you account for every member's name. If you missed selecting the Household Member in the drop down box you will be missing a member and have a duplicate member. Click on one of the duplicates. Check it to see if it has the information for that member or the missing member. Use the Edit button to change the one that needs to be changed, make the change, and save. Because this information is used in the APR, this is an area where you could have missing data that you will have to come back in to correct.

Step by Step Instructions: How to Enter Special Needs

1. Make sure the project you want to enter the special needs information into is showing at the top

   * If it is not,
     a. hover over the page number in the bubbles above the blue line to find the right project
     b. Click that page number to display the correct project
     c. Whatever project is showing will be the one you are entering clients into.

2. Fill out the data entry screen with the Head of Household's information

3. Click the Save button

4. If you have more household members, decide if you want to Add or Copy
   a. To add a household member
      1) Click the Add button
      2) Use the Household Member drop down list to select the next member
      3) Fill out the fields with this member's information
      4) Click the Save button

   b. To Copy
      1) Make sure you have the Head of Household's page open by Hovering over the page number bubbles under the blue line or at the bottom of the screen until you find the Head of Household's page.
      2) Click that page number bubble to display the Head of household's page
      3) Click the Copy button
      4) Use the Household Member field to select the correct member
      5) Change any fields that have different values for this member than the Head of Household's values
      6) Click Save.

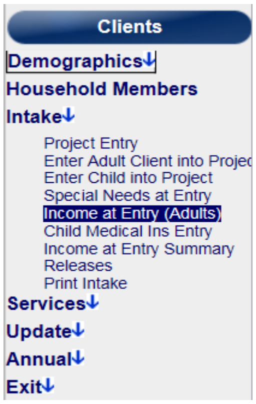
NOTE: This is where many go astray. CLICK SAVE for each member before you go to the next member, or you will lose that persons record.

      7) To enter another member repeat from 'To Copy step b 1'. You can only copy from the Head of Household's record

Note: While you are entering household members Do Not Click the Next Button. It will take you out of the current menu item.

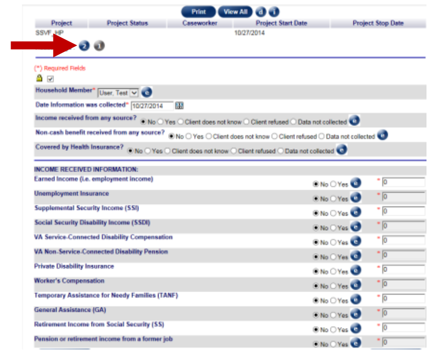
5. Before you leave this screen count the number of bubbles under the blue line and make sure the number matches the number of Household Members. Hover over each page number bubble and make sure you account for every member's information
6. Click the Income at Entry (Adults) menu item to move to the next screen

Income at Entry for Adults and Child Medical Insurance



Income information must be entered for all adult household members participating in the project.

Make sure you have the right project showing at the top of the screen above the blue line.



When you have the information entered for the Head of Household click save.

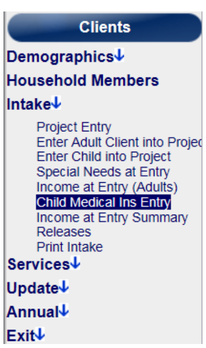
You must make an entry for all adult Household Members even if the member has no income.

To enter Income information for another household member click the Add button.

Use the drop down arrow on the Household Member field to select the household member. The date auto populates to the project entry date. (2014 data standards) For data about project entry this date must be the same as the project entry, exit data must be the same date as the project exit date, all forms for an annual must be the same date, all forms for an update must have the same date. Fill out the information and click the Save button. Count your bubbles and check your names.

Child Medical Inssurance Entry

“Child Medical Ins Entry” is an abbreviated version of the Income screen. You will need to fill out and save one of these for every Household Member that is under the age of 18 at the time of entry. Count your bubbles and check your names.



Income at Entry Summary

Income at Entry Summary is a summary page that shows all the members combined income. Use this to check the total income to be sure you got everything entered.

Step by Step Instructions: Enter Income at Entry (Adults) and Child Medical Ins Entry

1. Make sure the project you want to enter the Income information into is showing at the top above the blue line
   * If it is not,
     a. Hover over the page number bubble above the blue line to find the right project
     b. Click that page number bubble to display the correct project
     c. Whatever project is showing will be the one you are entering the household into.

2. Fill out the data entry form with the Head of Household's information and click the save button
3. If you have more adult Household Members, decide if you want to Add or Copy
   a. To add a Household Member
      1) Click the Add button
      2) Use the Household Member drop down list to select the next Adult member
      3) Fill out the fields with this member's information
      4) Save
   b. To Copy (For income I strongly recommend Add, most income is one person specific)
      1) Make sure you have the Head of Household's page open by hovering over the page number bubbles above the blue line or at the bottom of the screen until you find the Head of Household's page
      2) Click that page number bubble to display the Head of Household's page
      3) Click the Copy button
      4) Use the Household Member field to select the correct adult member
      5) Change any fields that have different values for this member than the Head of Household's values
      6) Click Save.

NOTE: This is where many go astray. CLICK SAVE for each household member before you go to the next, or you will lose that persons record.

      7) To enter another adult Household Member repeat from 'To Copy step b 1'. You can only copy from the Head of Household's record

Note: While you are entering household members Do Not Click the Next Button. It will take you out of the current menu item.

4. Before you leave this screen hover over each number bubble under the blue line or at the bottom of the page and make sure you account for every adult Household Member's information.
5. Use the Child Medical Ins. Entry to enter information for every Household Member under the age of 18 at the time they enter the project.
6. Click on the Income Summary.

7. Check the totals to make sure you got all the income recorded.

Releases

Every client must sign a release of information form. These releases are generally good for 1 year. This page captures the date the release was signed, what agency or agencies it pertains to, and when it will expire.

-CONFIDENTIALITY-
Most importantly this is where you allow sharing of demographic and unlocked information. You determine what agency or agencies you want to share this client's demographic information and any unlocked information with.

To release the demographic and unlocked data to any active agency in the system,

1. Enter the date the Head of Household signed the release into the top field labeled "Enter release date"
2. Click Release to All

Each agency will list below showing that they will have access to this released information.

-CONFIDENTIALITY-
If the client asks to limit what agencies the information is shared with enter the date the client signed the release into the Release Date field, select the first agency you can share with, if you want to designate a date for the sharing to expire other than the default of one year, enter that date into the Expiration Date. Click Save. The values you entered will list below the fields. In this way enter each of the allowed agencies.

Or you can enter all by following the previous instructions and then delete the un-allowed agencies from the list.

Step by Step Instructions: How to Release Demographic and Unlocked Information to Other Agencies

1. Choose whether you are releasing to all the agencies or to select agencies
   a. Release to all
      1) Enter the date the client signed the release into the "Enter release date" field
      2) Click the Release to All button

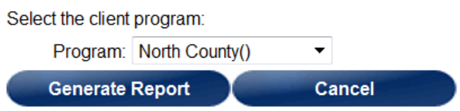
   b. Release to select agencies
      1) Enter the date the client signed the release into the Release date field
      2) Select the agency you will share the information with
      3) Change the Expiration Date to whatever the expiration will be or leave it alone to accept the one year default
      4) Click the Save button

Print Intake

This menu item allows you to print out a well formatted version of everything you have entered for this Household under the Intake section.

If you are entering live, not from a previously completed paper form, you will print out this section and put the paper copy into the clients chart. Click on the menu item Print Intake.

A pop-up box will come up asking you to select the project you want the report to reflect. Use the drop down arrow to select the project then click Generate Report.



-CONFIDENTIAL- Notice the report shows in each area if the information is locked or not. The X signifies locked. This screenshot shows the project information is locked.

Alias Info - Tinker Bell - CONFIDENTIAL

(*) Required Fields

Date	First Name	Last Name	SS#*	DOB

Household/Family Members for Tinker Bell

Name	Age	Gender	Relationship	Cross Ref Only	Has Programs
Stinker Bell	110	F	Daughter		
Fairy Bell	110	F	Daughter		
Liberty Bell	110	M	Son		
Christmas Bell	10	F	Daughter		

Program Entry - Tinker Bell - CONFIDENTIAL

Intake ID	63
	X
Program	North County
Program Status	Active
Caseworker	TMEDZYK
Family Type	Families with children headed by a single adult fe
Date Referred	03/05/2010
Referring Agency	
Referred By Other	
Program Entry Date	
Program Exit Date	

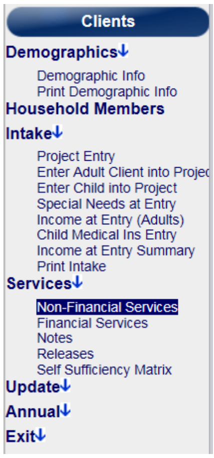
Our Policies and Procedures document makes reference to the HUD requirement: "Upon written request, clients shall be given a printout of all data specifically relating to them, within 10 working days (or 10 working days after the data has been entered if the data has not been entered at the time the request is made)."

-Confidentiality-
If a client wants a copy of all the information entered about him/her this along with the demographic print out are the reports you would run, print out, and give to the client. You must make it very clear to the client that by giving them this paper copy, they and they alone are responsible for keeping it secure.

Note: You can collapse Intake if you wish by clicking on the Intake menu item

Services

Non-Financial Services

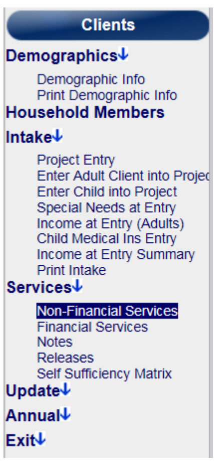


Enter the date the service was provided. Select the service that was provided. Select which agency provided the service. Enter the start and stop dates.

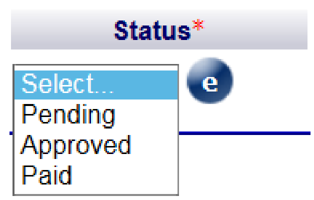
Note that most services will have the same date for Start and Stop. If a service was provided on 1/1/2015 then both the Start and Stop dates will have 1/1/2015. You cannot enter a future date, but you can enter the beginning date and then come back and enter the Stop date once it is no longer in the future.

Save your entry. You will enter services as you provide them.

Financial Services



Enter the date the financial service was provided. This is usually the date the check is cut.



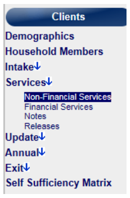
Status can help you enter the financial Services that span into future dates. You can enter the current Status of the Financial Service, then come back in and change the Status once the future date is no longer in the future.

Select the Funding Source of RR for Rapid Rehousing or HP for Homeless Prevention.

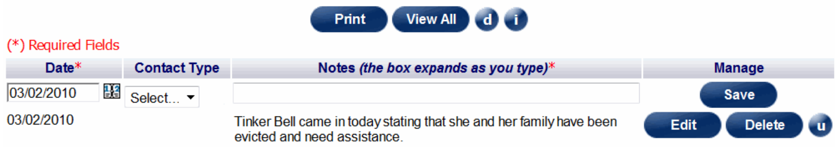
Select the service that was provided. Enter the dollar amount. Enter the start and stop dates.

Financial Services that do not cover a period of time will have the same date for Start and Stop. These include Rental Application, Security Deposit, Utility Deposits, Utility Payment, and Moving Costs. Financial Services that do cover a period of time will have different Start and Stop dates. Rent, Last Month's Rent, Motel Voucher will all need the first day of the covered period for the Start Date and the last date of the covered period for the Stop Date. So Rent for the month of January 2015 would be entered as Start Date: 1/1/2015 and Stop Date: 1/31/2015.
Save your entry. You will enter the Financial Services as you provide them.

Notes



Case notes allow up to 3,000 characters per note.



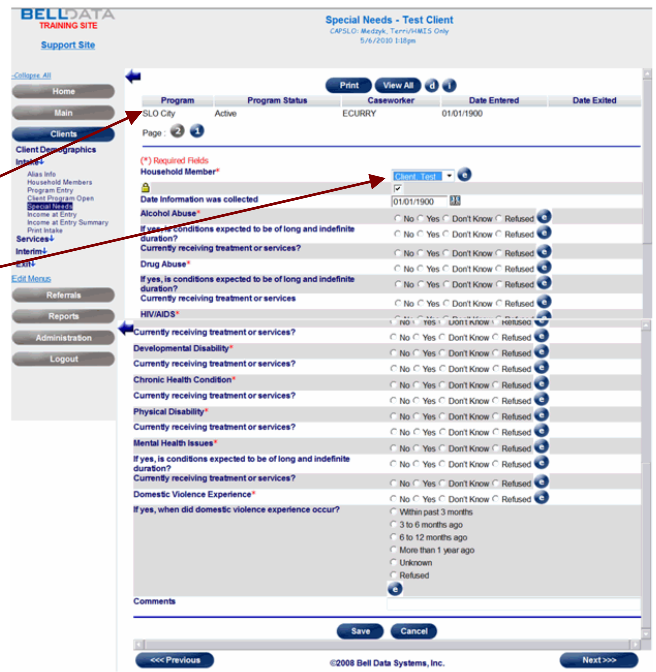
Notes are shown in descending order. So, the newest Case Note (according to the date you enter) will always be on top. There is no limit to the number of case notes you can enter.

Save will add the entry to the list.

Annual

Special Needs at Annual

Special Needs Annual assessment is for clients who are in the project over a year. (2014 data standards) You must collect and enter an annual assessment within 30 days before or 30 days after the yearly anniversary of the client entering the project.



Special Needs must be entered for each household member participating in the project.

Make sure you have the right project showing, and select the household member using the drop down arrow. Always start with the Head of Household's information.

SAVE the record by clicking the Save button at the bottom of the page. You must SAVE each page to create a record for each Household Member.

Once you have saved the Head of Household's record, that record shows. You can then Add or Copy to put in the next household member. Make sure you get all household members saved.

Note: If you click the Next button before you save the **last** member, the project will prompt you to save. If you do not save between Household Members you will loose data.

As you add the Special Needs records for your household members, you will see the page number bubbles under the blue line and at the bottom of the screen. Before you leave this screen hover over each number bubble and make sure you account for every member's information. Because this information is used in the APR, this is an area where you could have missing data you will have to come back in to correct.

Step by Step Instructions: How to Enter Special Needs Annual Assessment

1. Make sure the project you want to enter the special needs information into is showing at the top
   * If it is not,
     a. hover over the page number bubble to find the right project
     b. Click that page number bubble to display the correct project
     c. Whatever project is showing will be the one you are entering clients into.

2. Fill out the data entry screen with the <u>Head of Household's</u> information

3. Click the Save button

4. If you have more household members, decide if you want to Add or Copy
   a. To add a household member
      1) Click the Add button
      2) Use the Household Member drop down list to select the next member
      3) Fill out the fields with this member's information
      4) Click the Save button

   b. To Copy
      1) Make sure you have the Head of Household's page open by hovering over the page number bubbles below the blue line or at the bottom of the screen until you find the Head of Household's page
      2) Click that page number bubble to display the Head of Household's page
      3) Click the Copy button
      4) Use the Household Member field to select the correct member
      5) Change any fields that have different values for this member than the Head of Household's values
      6) Click Save.

NOTE: This is where many go astray CLICK SAVE for each member before you go to the next member, or you will loose that persons record.

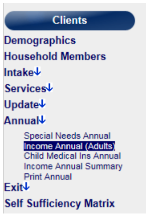
      7) To enter another member, repeat from 'To Copy step b 1'. You can only copy from the Head of Household's record

Note: While you are entering household members Do Not Click the Next Button. It will take you out of the current menu item.

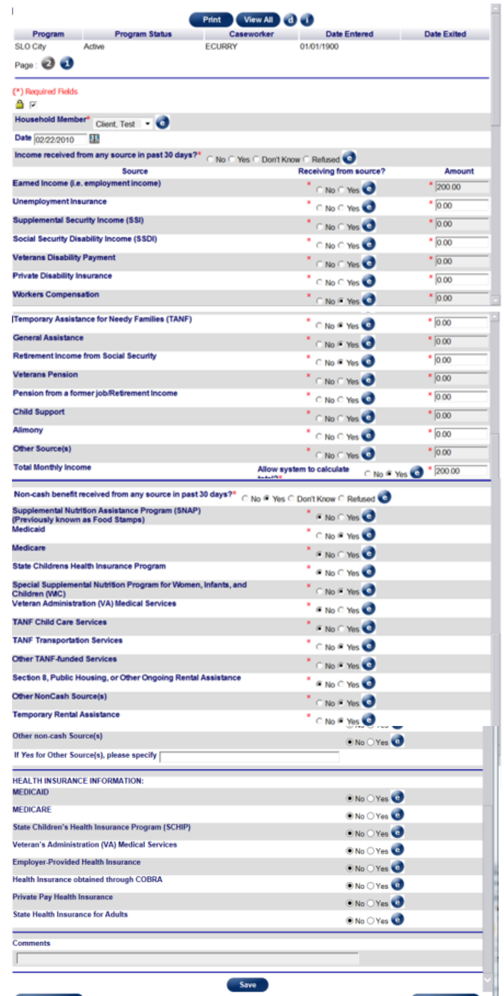
5. Before you leave this screen hover over each page number bubble and make sure you account for every member's information

6. Click the Next button or click the Income Annual (Adults) menu item to move to the next screen

Income and Medical Insurance at Annual



Income Annual (Adults) and Child Medical Ins Annual assessments are for clients who are in the project over a year. (2014 data standards) You must collect and enter an annual assessment within 30 days before or 30 days after the yearly anniversary of the client entering the project.



Make sure you have the right project showing at the top of the screen.

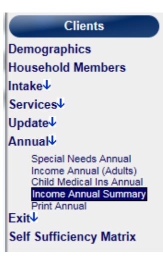
When you have the information entered for the Head of Household, click save.

You must make an entry for all adult household members. To enter Income information for another adult household member click the Add button.

For each child Household Member enter the annual assessment into Child Medical Ins Annual. Be sure to save each record.

Click Income Annual Summary on the menu.

Income at Annual Summary



Income at Interim Summary is a summary page that shows all the adult household members income combined. Use this to check the total income to be sure you got everything entered.

Step by Step Instructions: How to Enter Income and Medical Insurance for an Annual Assessment

1. Make sure the project you want to enter the Income information into is showing at the top

   * If it is not,
     a. hover over the page number bubble to find the right project
     b. Click that page number bubble to display the correct project
     c. Whatever project is showing will be the one you are entering clients into.

2. Click on Income Annual (Adults) and fill out the data entry screen with the Head of Household's information and click the Save button

3. If you have more adult household members, decide if you want to Add or Copy
   a. To add an adult household member
      1) Click the Add button
      2) Use the Household Member drop down list to select the next Adult member
      3) Fill out the fields with this member's information

   b. To Copy (For income I strongly recommend Add, most income is one person specific)
      1) Make sure you have the Head of Household's page open by hovering over the page number bubbles under the blue line or at the bottom of the screen until you find the Head of Household's page
      2) Click that page number bubble to display the Head of Household's page
      3) Click the Copy button
      4) Use the Household Member field to select the correct adult member
      5) Change any fields that have different values for this member than the Head of Household's values
      6) Click Save.

NOTE: This is where many go astray CLICK SAVE for each household member before you go to the next, or you will loose that persons record.

7) To enter another adult household member, repeat from 'To Copy step b 1'. You can only copy from the Head of household's record

Note: While you are entering household members Do Not Click the Next Button. It will take you out of the current menu item.

4. Before you leave this screen hover over each number bubble and make sure you account for every household member's information

5. Use the Child Medical Ins Annual menu item to enter information for every Household Member under the age of 18 at the time they enter the project.

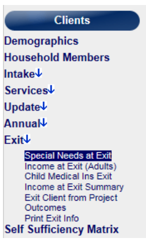
6. Click the Income Annual Summary menu item to move to the next screen

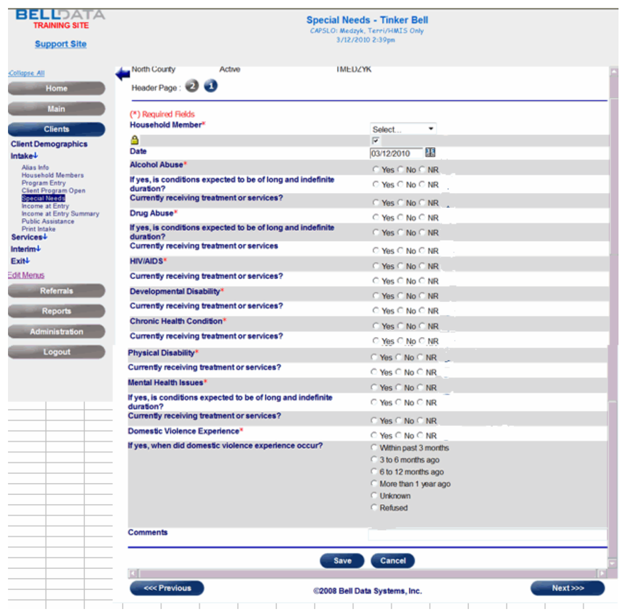
7. Check the totals to make sure you got all the income recorded.

Exit

To enter a project we created the project using Project Entry and then entered the individuals into the project. To exit we work in reverse. First we enter the exit information for each Household Member from Special Needs, then the adults Income at Exit, then the children's Medical Insurance information, and then we exit the household members from the project. In that order. Once the last Household Member has been exited, the system will enter an exit date for the Project.

Special Needs at Exit





Special Needs at Exit must be entered for each household member exiting the project.

Make sure you have the right project showing, and select the household member using the drop down arrow.

SAVE the record by clicking the Save button at the bottom of the page. <u>You must SAVE each page to create a record for each Household Member.</u>

Once you have saved the Head of household's record, that record shows. You can then Add or Copy to put in the next household member. Make sure you get all household members saved.

Note: If you click the Next button before you save the **last** member, the project will prompt you to save. If you do not <u>save between Household Members</u> you will loose data.

As you add the Special Needs at Exit records for your household members, you will see the page number bubbles under the blue line and at the bottom of the screen. Before you leave this screen hover over each number bubble and make sure you account for every member's information. Because this information is used in the APR, this is an area where you could have missing data you will have to come back in to correct.

Step by Step: How to Enter Special Needs at Exit

1. Make sure the project you want to enter the special needs at Exit information into is showing at the top
   * If it is not,
     a. hover over the page number bubble to find the right project
     b. Click that page number bubble to display the correct project
     c. Whatever project is showing will be the one you are entering clients into.

2. Fill out the data entry screen with the Head of Household's information

3. Click the Save button

4. If you have more household members that are exiting the project, Decide if you want to Add or Copy
   a. To add a household member
      1) Click the Add button
      2) Use the Household Member drop down list to select the next exiting member
      3) Fill out the fields with this member's information
      4) Click the Save button

   b. To Copy (If the Head of Household is not exiting the project you cannot use Copy)
      1) Make sure you have the Head of Household's page open by hovering over the page number bubbles under the blue line or at the bottom of the screen until you find the Head of Household's page
      2) Click that page number bubble to display the Head of Household's page
      3) Click the Copy button
      4) Use the Household Member field to select the correct member
      5) Change any fields that have different values for this member than the Head of household's values
      6) Click Save,

NOTE: This is where many go astray CLICK SAVE for each member before you go to the next member, or you will loose that persons record.

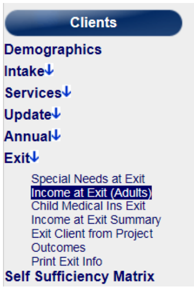
      7) To enter another exiting member, repeat from 'To Copy step b 1'. You can only copy from the Head of Household's record

Note: While you are entering household members Do Not Click the Next Button. It will take you out of the current menu item.

5. Before you leave this screen hover over each page number bubble and make sure you account for every exiting member's information

6. Click the Next button or click the Income at Exit (adults) menu item to move to the next screen

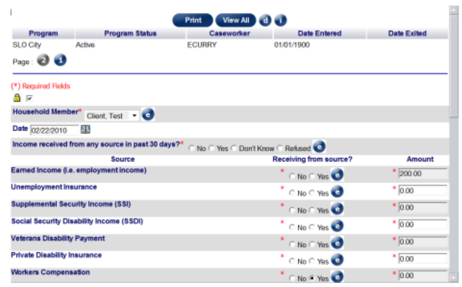
Income at Exit (Adults) and Child Medical Insurance



Income information must be entered for all adult household members participating in the project.

Make sure you have the right project showing at the top of the screen above the blue line.

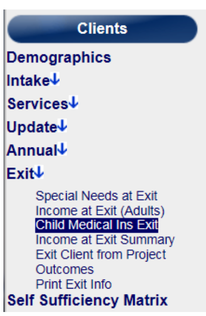
When you have the information entered for the Head of Household, click the save button.



You must make an entry for all adult household members even if the member has no income.

To enter Income information for another adult household member click the Add button.

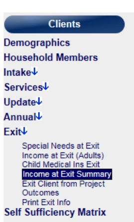
Use the drop down arrow on the Household Member field to select the household member. The date auto populates to the project exit date. (2014 data standards) Project exit date must be the same as the project exit data. Fill out the information and click the Save button.



For each child Household Member enter the Exit assessment into Child Medical Ins Exit. Be sure to save each record.

Click Income at Exit Summary on the menu.

Income at Exit Summary



Income at Exit Summary is a summary page that shows all the members income combined. Use this to check the total income to be sure you got everything entered.

Step by Step Instructions: How to Enter Income and Medical Insurance at Exit

1. Make sure the project you want to enter the Income information into is showing at the top

   * If it is not,
     a. Hover over the page number bubble above the blue line to find the right project
     b. Click that page number bubble to display the correct project
     c. Whatever project is showing will be the one you are entering clients into.

2. Fill out the data entry screen with the Head of Household's information and click the Save button

3. If you have more household members, decide if you want to Add or Copy
   a. To add a household member
      1) Click the Add button
      2) Use the Household Member drop down list to select the next member
      3) Fill out the fields with this member's information

   b. To Copy (For income I strongly recommend Add, most income is one person specific)
      1) Make sure you have the Head of Household's page open by hovering over the page numbers at the bottom of the screen until you find the Head of household's page
      2) Click that page number bubble to display the Head of household's page
      3) Click the Copy button
      4) Use the Household Member field to select the correct member
      5) Change any fields that have different values for this member than the Head of Household's values
      6) Click Save,

NOTE: This is where many go astray CLICK SAVE for each member before you go to the next, or you will loose that persons record.

      7) To enter another member, repeat from 'To Copy step b 1'.

You can only copy from the Head of household's record

Note: While you are entering household members Do Not Click the Next Button. It will take you out of the current menu item.

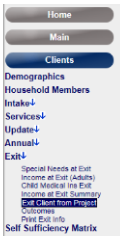
4. Before you leave this screen hover over each number bubble and make sure you account for every member's information

5. Use the Child Medical Ins Annual menu item to enter information for every Household Member under the age of 18 at the time they enter the project.

6. Click the Income summary menu item to move to the next screen

7. Check the totals to make sure you got all the income recorded.

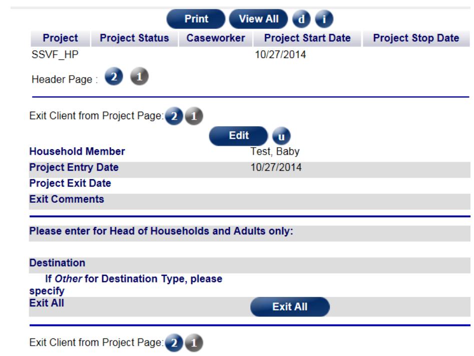
Client Info at Exit



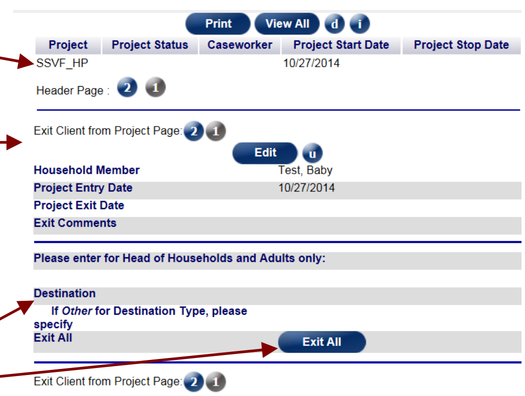
Now you are ready to exit the members from the project.

Like the Client Info at Entry, each household member participating in the project must be exited before you exit the family from the system.

Note: A member of the household might exit the project before the other members. Because you will be exiting them individually, you can exit them on different dates. You can go in and exit the member that is leaving the project using the date that individual left. Leave the project open so the others are still in the project, you can exit the Head of household if you must and leave the remaining household members in the project, however, to access those members you would still go into the record using the head of household.



Now, for the really confusing part.
Instead of seeing blank forms like we did when we entered the members, to Exit we Edit information in the same table that we entered the Entry information into. Therefore we will see a form with the project entry date filled in. We click Edit to fill out the Exit info.



Make sure you have the right project at the top.

Make sure you have the right household member page (access the individual household members by clicking the page number bubble under the blue line of the member that is leaving).

To exit the whole household at once, find the Head of Household's page, click the Edit button and fill out the information including destination, then click the Exit All button. This will copy the information to the other household members.
You must start with the Head of Household for this to work. If you exited a household member earlier you cannot use this button.

Or, you can exit the members one at a time by clicking on their page number bubble under the blue line, click the Edit button, fill-in the information, then, click the Update button to save. You only fill in the Destination on the Head of Household.

Enter the date this particular person exited the project.

Step by Step Instructions: How to Exit The Household Members From The project

1. Make sure the project you want to exit the member from is showing at the top
   * If it is not,
     a. hover over the page number bubble above the blue line to find the right project
     b. Click that page number bubble to display the correct project
     c. Whatever project is showing will be the one you are exiting members from.

2. Make sure the member you want to exit the project from is showing in the detail area (to use exit all you must select the Head of Household here)
   * If it is not,
     a. hover over the page number bubble below the blue line to find the right member
     b. Click that page number bubble to display the correct member

3. Click Edit. Date Entered will already be populated, this is the date this person entered the project

4. Enter the date this member exited the project into the Project Exit Date field

5. You must select the Destination from the HUD Standard values listed for the Head of Household.

6. Click the Save button

7. To exit all the remaining members from the project (only if all members are leaving the project at the same time), click the Exit All button

8. Before you leave this screen select each page number bubble below the blue line in turn and look at each member's page. Make sure each member that should be exited is exited and any member that should still be in the project has not been exited

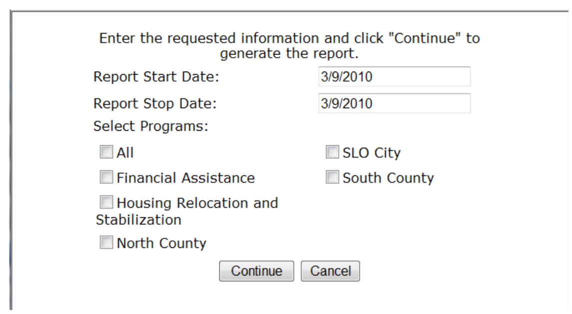
Reports

HUD APR Errors

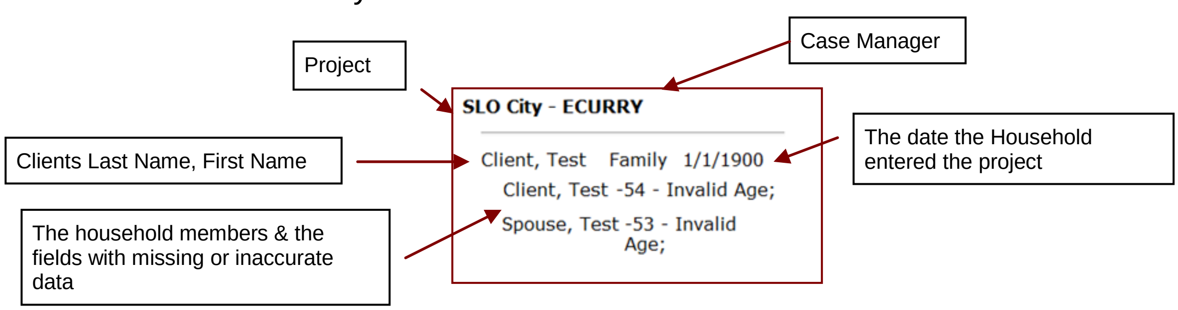
The HUD APR Errors report shows you exactly where you are missing critical data for the APR report. Once you have your data entered you need to run the APR Errors report. It is really important that you run this report while you have the data in front of you. So, before you return the charts be sure to run this.

When you click on the HUD APR Errors menu item you will get a pop-up. You will put in the date and project parameters.

Put in the date range of the data you entered. If you want to run it after each projects data entry then you can run it for just that project by clicking the check box next to the project. Be sure to check all the projects you want to check for errors.



The report will show in the same pop-up box. You can maximize it for your convenience.



Using this report you can go back in and correct any issues while you still have easy access to the information. This report must be blank before a clean APR report can be submitted. It is much easier to fix these issues right away while you still have the information in front of you than to have to go find it days or months later. You are responsible for correcting these errors.

Step by Step Instructions: How to run and use the HUD APR Errors Report

1. Under Reports on the menu, click on HUD APR (New 2013) to expand that menu heading.

2. Click on HUD APR Errors

3. When the pop-up box opens, maximize it

4. Enter the date range. The report uses the Project Entry Date from the Project Open page
    a. You can run it for the full APR year range
    b. You can just enter the date range of the data you just entered

5. Select the Project or Projects you want to check.

6. When the report comes up, identify the household members or clients in your charts or hard copy records.

7. Determine where you need to go back in the project to enter or correct the information.

8. You can make notes off the print preview or you can print out the report and work off of it.

9. Go back into the project and make the changes.

10. Run the report again using the same parameters (dates and project(s))

11. Do this until the report comes up with no household members or clients showing.

Data Sharing Events Report

In our Policies and Procedures document a reference is made to the HUD requirement to allow clients to "request a written report of data sharing events, including dates, agencies, persons, and other details pertaining to their client specific data within 10 working days (or 10 working days after the data has been entered if the data has not been entered at the time the request is made).

-CONFIDENTIALITY-
In the event a client requests this report contact your HMIS System Administrator. The report will be run and a sealed copy will be sent to an address given by the client or back to the requesting agency to be picked up by the client.

Because this report could become a document in a legal action the HMIS System Administrator will do a preliminary investigation to justify all sharing events on the report. If it is determined that a breach of confidentiality may have taken place a more in-depth investigation will be implemented.